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# THE COMMONWEALTH OF MASSACHUSETTS

## BOARD OF REGENTS OF HIGHER EDUCATION

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BOARD OF REGENTS LONG RANGE PLAN FOR PUBLIC  
HIGHER EDUCATION IN MASSACHUSETTS

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### Introduction

The legislation creating the Board of Regents in 1980 requires long-range planning on two levels: a Regents' statewide five-year plan addressing systemwide issues confronting public higher education in the Commonwealth; and twenty-seven institutional five-year plans developed at the campus level to address concerns vital to carrying out the mission of each college.

With the adoption of A Long-Range Plan for Public Higher Education in Massachusetts: Phase I in June of 1982, the Board of Regents set in motion a series of policy initiatives designed to assure a public higher education system which is of high quality, responsive to changing educational needs and both accessible and accountable to the public. This report covers subsequent planning activities during FY 1983-84 which centered on two primary objectives: (1) continuation and further development of long-range planning processes at the institutional and system levels; and (2) implementation of priority planning directives contained in the Regents' long-range plan.

### Review and Approval of Institutional Plans

During 1982-1983, each institution within the system engaged in a concentrated campus planning effort to draft institutional five year plans within the common policy guidelines established by the Regents. Three objectives were of major importance during the first year of the campus long range planning efforts: development of institutional long-range planning capabilities; consistency of individual campus plans with systemwide policy contained in the Regents' Long-Range Plan; and determination of campus perspectives on planning priorities.



The Board of Regents accepted nineteen institutional plans in 1982-83, and seven more in November, 1983 (Appendix I). This year, the major objective of the institutional planning process was further strengthening of campus-based planning. The Board carefully monitored progress toward meeting stated objectives and addressing areas of weakness in existing plans, as well as institutional commitment of resources required for developing and maintaining sound campus planning.

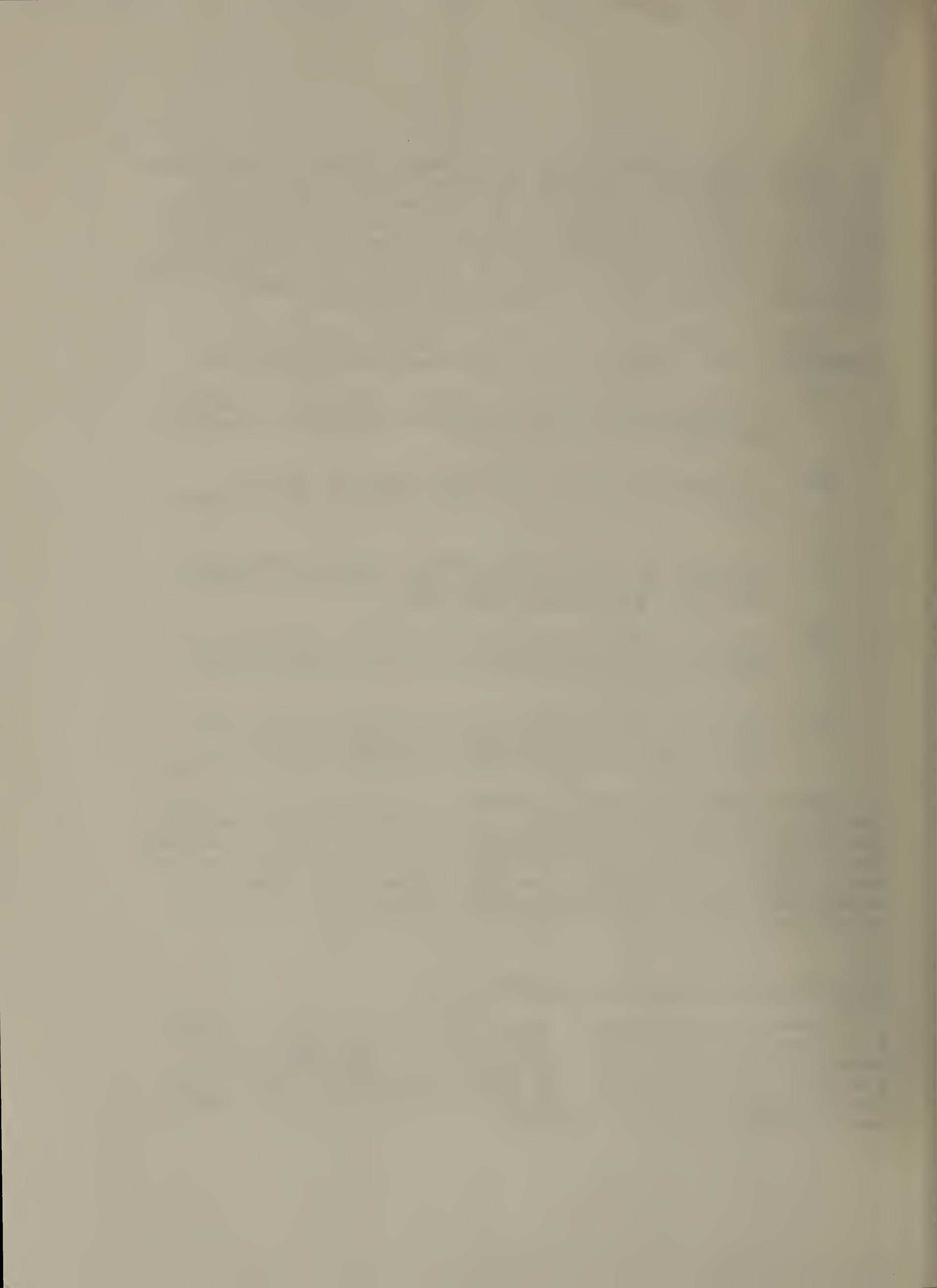
Under the guidelines for the 1984 annual update of long-range plans (Appendix II), campuses were required to:

- (1) Provide a progress report on success and/or problems in meeting major objectives in relation to timetables identified in the 1983 Plan.
- (2) Indicate what steps have been taken to address neglected areas or major weaknesses in the original plan.
- (3) Describe what effect the adoption of new admission standards and policies will have upon institutional enrollment and program offerings.
- (4) Report in detail on progress made in expanding and improving transfer articulation with other public institutions; and
- (5) Describe in detail the current status of minority enrollments and what steps are being taken to improve the recruitment and retention of minorities.

Updates have been received from all but one of the system's colleges and universities, and are now undergoing evaluation. Preliminary analysis indicates that last year's gains have been consolidated, and the less adequate campus plans improved to meet systemwide standards. The 1985 update guidelines, now under development, will direct more thorough plan revisions, with particular emphasis on enrollment planning.

#### Revision of the Regents' Long Range Plan

Phase I of the Regents' Long Range Plan was an explicitly incomplete document, which set aside for later consideration several topics of central importance to higher education planning. During 1983-84, the Board adopted new sections of the plan addressing two key areas of current concern: enrollment planning and tuition policy.





One of the greatest challenges confronting Massachusetts higher education during the rest of this century is that posed by rapid demographic change. The Board of Regents is specifically charged by its enabling legislation with responsibility for enrollment projections and enrollment management, and for collection and maintenance of data on public and independent higher education in the Commonwealth. Enrollment management was designated in Phase I of the Regents' Long Range Plan as a vital policy area for the Board; the report, Shaping the Future of Massachusetts Higher Education: Demographic Change and Enrollment Prospects, adopted as a section of the Long Range Plan in November, 1983, set forth the context of enrollment planning and offered a number of proposals for systemwide and institutional planning procedures.

The principal recommendation of the report is that the Board, and the colleges and universities, should engage in concerted enrollment planning and management. Enrollment planning should become an integral part of the campus planning process, with long-term (e.g., five or ten year) enrollment plans revised annually. In order to achieve effective enrollment planning for Massachusetts higher education, the Board of Regents should take the lead in developing and maintaining essential data and technical capabilities.

The Regents should ensure that each college and university, in its Long-Range Plan, specifies an institutional mission that is realistically responsive to changing demographic conditions; and should reconsider their own segmental mission statements in view of the adaptations these conditions will require. A greater differentiation among institutions, depending upon their degree of orientation toward traditional or nontraditional clienteles, may be desirable in order to provide appropriate services for all students; increased academic program specialization will allow efficient allocation of resources. While some should stress strategies to recruit and retain students, others should seriously consider the possible advantages of decreasing enrollment over a period of years.

In fulfillment of the Regents' commitment to assure access to public higher education for all qualified students, the Massachusetts public higher education system should prepare itself to serve effectively the nontraditional students who will constitute an increasing proportion of its enrollment in coming years. Colleges and universities should adopt specific recruitment plans to increase the participation rates of minority and low-income groups in higher education, and should provide financial aid and support services meeting the needs of older students.



The report recommends that the Board of Regents allow the individual boards of trustees and their presidents sufficient autonomy, flexibility, and resources to respond to the needs of these emerging constituencies. At the same time, the Board should provide strong direction by continuing its enunciation of priorities for the system of public higher education.

The Regents have already begun the process of modifying the budget formula to recognize factors other than enrollment. This process will relieve pressures to maintain or even expand enrollment at the expense of quality, and permit that considerable weight be given to program effectiveness. Specific financial incentives should be incorporated into the budget process to encourage sharing of resources among institutions in both the public and independent sectors.

The report also recommends that the Board of Regents reexamine its relationship with independent colleges and universities, some of which may be affected more adversely than the public sector by an enrollment decline. The Regents have already demonstrated their commitment to fruitful cooperation between the two sectors. More involvement will be required in the next decade, in the form of both technical and financial assistance. For their part, the independent institutions should be willing not only to share information and resources, but to be more accountable to the public in conducting and expanding academic programs.

### Tuition Policy

The Board of Regents is required by its enabling legislation to "develop a rational and equitable statewide tuition plan for all institutions of public higher education in the commonwealth, which plan shall take into account by type of institution the per student maintenance costs, total mandated costs per student and the need to maximize student access to higher education regardless of a student's financial circumstances." A systemwide tuition policy is an important component of the section of the Long Range Plan on Financing Higher Education.

The statement adopted by the Board on March 13, 1984, affirms that tuition policy should be grounded in the public mission of our higher education system: Service to the Commonwealth through programs of excellence for all qualified students. Tuition charges, therefore, must be linked to equitable public funding of higher education, and must not increase except in the interest of educational quality. The present policy is designed to provide a solid framework for consideration of tuition issues, without enforcing a rigid lock-step pattern of increases.







The Tuition Policy conforms to the requirements of the Enabling Act by predicating tuition levels upon a percentage of appropriated state funds supporting regular academic programs, established by type of college or university within the system. By facilitating comparison of costs and charges among types of institutions, this approach promotes an equitable systemwide tuition schedule. Recognizing the paramount importance of maintaining access to the system for all students, the Regents' policy places caps on the share of educational costs to be assumed by students, and on the annual increase in tuition charges. It stresses, too, that financial aid programs should be commensurate with tuition increases, and with total student expenses.

A number of tuition-related issues are recommended for further study. These include refinement of the definition of cost and enrollment figures; funding of graduate and continuing education; and campus-retained tuition and fees. The Regents will pursue these matters in consultation, as appropriate, with state and campus officials.

#### Regents' Long-Range Plan Implementation

Phase I of the Regents' Long-Range Plan contains more than fifty directives designed to improve academic planning and management at both the institutional and state-wide level. The Board has given certain of these highest priority for implementation. During 1983-84, significant progress was achieved in programs already underway; and new initiatives recommended by the demographic report were undertaken. These priorities were included in the campus plan update guidelines (above), and thus were addressed at both the institutional and system levels.

#### Statewide Review of Programs in Engineering and Nursing

In FY83, the Special Advisory Task Force on Program Review had selected engineering and nursing as priority areas for statewide review. This group developed guidelines and schedules for the reviews, and commissioned needs assessment studies which were available for the out-of-state evaluators as they began Phase II of the reviews, the on-site visits.

All public colleges and universities and, with the cooperation of the Association of Independent Colleges and Universities of Massachusetts, almost all of the independent institutions that offer baccalaureate and associate degree programs in nursing and in engineering participated in the review. The teams visited a 32 of 34 nursing degree programs and 22 of 25 engineering degree programs in the state. It also assessed the University of Massachusetts/Boston engineering collaborative and the proposed nursing program at Roxbury Community College. The extent of the cooperation between the public and independent sectors assured the completeness of the reviews as well as the validity of the results.



After review by presidents and the Regents' Academic Affairs Committee, the reports were accepted by the full Board on June 19th.

The value of the results of the statewide reviews to program planning in nursing and engineering is already apparent. A separate line item has been reserved for equipment in the FY85 budget and the reports have stimulated discussion on program articulation. The analysis of this year's process and the value of the experience will inform and facilitate the evaluation of business administration programs scheduled for statewide review in CY84.

### Articulation

The Board of Regents work to improve articulation within the Commonwealth's educational system on three levels: within the public higher education system itself; between public and independent higher education; and between higher education and the primary and secondary schools.

In order to promote coordinated system of publicly-supported education in the Commonwealth, the Regents approved a revision of the Commonwealth Transfer Compact at the Board meeting on May 8, 1984. The revised Compact, developed primarily through campus-based groups, is one of the most important undertakings of the Board of Regents; with its acceptance, the Board has put in place a major component of its plan to ensure student access to baccalaureate programs.

The new Commonwealth Transfer Compact will provide a better process for the transfer of college credits by recognizing the academic progress of community college students. It provides guidelines for transfer admissions standards, and for developing articulation on a program-by-program basis. At the same time, the Compact increases the allocation of space for transfer students, provides for the establishment of a Transfer Coordinating Committee to review articulation policies, and requires the appointment of a Transfer Officer on each campus.

The Board made notable strides in 1983-84 in cooperation with independent higher education. The Boston engineering collaborative was successfully implemented: Fourteen University of Massachusetts/Boston students were accepted for transfer to Tufts, Northeastern, and Boston University. The strong participation of the independent sector in the statewide reviews of the nursing and engineering has already been mentioned. Important progress has also been achieved in cooperative approaches to program planning and enrollment planning--two fields in which coordination is essential.

Public higher education continues to strengthen its







relationship with the primary and secondary education system through statewide and local initiatives. The Regents' office supports Department of Education efforts in a variety of fields, and has collaborated with the Joint Committee on Education as it plans statewide educational reform. Representatives from these bodies contribute to the work of Regents' task forces addressing admissions standards and other issues impinging upon K-12 education.

The FY 1985 budget includes \$3.7 million recommended by the Governor to support collaborative projects between public colleges and universities and the public schools. Under guidelines promulgated by the Regents, 145 projects were reviewed by a Special Advisory Committee and 66, from all regions of the state, were funded, in four categories: computer literacy projects, in-service training for teachers primarily in math and science, programs for gifted and talented students, and educational research and curriculum development. In addition, the Boston Consortium composed of 25 public and private colleges and universities was also funded. A portion of the funds were allocated for initiation of the Center for Teaching and Learning at Bridgewater State College, developed by the Regents in collaboration with the Governor's Office of Educational Affairs.

Some of the most important collaborations with the schools are local initiatives, between individual campuses and nearby school systems. The Regents' campus planning process includes provisions to monitor and encourage these programs.

#### Admissions Standards

In May 1983, the Board of Regents voted minimum Admissions Standards for baccalaureate institutions on an interim basis. Further consultations and discussions were incorporated into the final draft of the Standards that was adopted by the Regents on January 10, 1984. At its April and May meetings, the Board approved institutional admissions plans for each campus in accordance with the minimum standards.

Several outstanding issues relating to the Standards were designated for further study: the feasibility of an arts requirement; the weighted rank-in-class component of the sliding scale eligibility index; and the ability of learning disabled students to meet the Admissions Standards foreign language requirement. A data collection system to monitor the effect of the Standards on campus admissions is being developed.

Copies of the new Admissions Standards were distributed to all superintendents and counselors, and workshops for counselors and school administrators were held throughout the state. For students, a booklet was prepared entitled A Guide to Academic Preparation for College; a condensed version will



be widely distributed among junior high and senior high school students this coming Fall. These activities help clarify questions about the Admissions Standards and will assure their proper implementation.

### Enrollment Planning

The Regents' report on demographic change and enrollment prospects, Shaping The Future of Massachusetts Higher Education, was adopted as part of the Long Range Plan in November 1983. This report calls upon the Board and the campuses to "engage in concerted enrollment planning and management." In order to establish realistic systemwide guidelines and provide resources for enrollment planning on the campuses, the Regents convened in January 1984 an Enrollment Planning Advisory Group including representative administrators from institutions throughout the system. The report of this Advisory Group (Appendix --) presented a series of recommendations which were accepted by the Board on June 19, 1984.

The enrollment planning process requires that each campus establish an enrollment planning task force to prepare a five year enrollment plan, examining its future enrollment prospects and policy options in the light of demographic and economic realities, administrative constraints, and educational mission; this enrollment planning process shall be integrated with the long-range planning process at the campus and system levels. The campuses shall supply to Board of Regents data supporting institutional and systemwide enrollment planning.

The Board of Regents will take the lead in statewide enrollment planning and, with the advice and assistance of a campus-based Enrollment Planning Advisory Group, monitor, coordinate, and support enrollment planning at the campus level through its established long range planning process. In addition to developing statewide enrollment databases and modeling capabilities, the Board will oversee construction of a prototype enrollment forecasting model adaptable to campus needs, arrange technical support, and furnish data resources to support campus enrollment planning.

To implement these recommendations, the Board of Regents has undertaken a linked series of projects which together form an integrated statewide enrollment planning process. Institutional enrollment planning will be emphasized in the 1985 Campus Plan Update guidelines, and will be coordinated and supported through a series of planning seminars in the fall and winter. Enrollment planning models for systemwide and campus use are being constructed by the Massachusetts Development Research Institute (MDRI), with the cooperation of the University of Massachusetts; prototype regional models will be ready by the end of 1984.







The Board will assemble two types of data to support enrollment modeling. From its own and campus databases, it will compile information on college admissions and enrollment, including 5 years of historical data where possible. To provide the necessary general demographic data--annually updated forecasts of city and town population by age, sex, race, and educational attainment--the Board has formed a Consortium for State Demographic Projections. Several state agencies (Department of Education, Department of Public Health, Division of Capital Planning and Operations) have joined the Consortium, and others, as well as private industry groups, are considering participation. The forecasts, based on the most advanced demographic and econometric techniques, will provide a great improvement in accuracy and detail over existing demographic data; the project itself is a model of interagency cooperation, and of public higher education's service to state government.

A comprehensive perspective on enrollment in the Commonwealth must take account of the interaction among public and independent institutions. The Board of Regents has therefore lent its support to a grant-funded MDRI study examining the dynamics of this process. With significant independent-sector participation, this work will add an important dimension to our capacity for effective statewide higher education planning.

